

Contract# 13-1-14-01 DSU Call Center Services Q&A

1. Page 4 states the University's goal is to increase communication channels and decrease cost per inquiry. Please explain which communication channels are currently in use by the University. Also, what is the current Average Cost per Inquiry? **Email, e-bills, parent buzz, parent page, town hall meetings, learning community meetings, street walk campaigns, updates on student portal page and signage are some the current methods used. We have also used table toppers, cafeteria visits and in the past.**
2. Page 5 states that the current call center services have been outsourced. Are you able to tell us which company holds the current contract? **CMD Outsourcing Solutions, Inc.**
3. For the January 9th Pre-Proposal Conference, will you provide dial-in information or must we attend in person? **Unfortunately, we will not have a conference call line available for this pre-proposal. However, the pre-proposal conference is not mandatory so please feel free to submit any questions and concerns that you may have by e-mail before the questions deadline.**
4. Were all calls identified in attachment B handled by a live agent or were some of these calls handled by an IVR system? **The calls are handled by live agents.**
5. What was the count of agents that handled the financial aid and student account inbound calls in the past year? **There are currently 7 representatives and 2 supervisors.**
6. What % change in call volume do you expect in 2013 since there is not a new software system or if federal aid is not delayed? **This would depend on the student/parent population we have and there familiarity with financial aid, student billing and their understanding of the financial clearance process.**
7. How are you looking at using text messaging? Randomly or in some sort of campaign? **Possibly for E-bill notification with the student to opted in.**
8. There is a question about call tracing? Can you explain more what you are looking for? The volume of tracing you might need? I have commonly provided ANT (automatic number identification) through our IVR system but have not had this request before when I have live operators. **In the past we have had calls that were dropped/lost in the queue, would you be able to retrieve the caller information. We have also had to request to hear the conversation that was held with the customer, would you be able to provide the call.**
9. Do you have any details on the number of calls received from non-English speaking customers? Do you have a breakdown by language? **No, we are a diverse university but all of our callers speak English when they call.**
10. For 90% of calls answered live, does that mean the calls can't go through an automated greeting and distribution queue – they each need to be answered by a live operator. **No,**

calls can go through an automated greeting and distribution queue but they may need to speak to a live representative,

11. The form is asking for a Delaware Business License Number. Do you know how long it will take to get a Delaware Business License? Do we have to have this number before we bid on this contract? **If awarded the contract, you will be required to obtain a Delaware Business License, but it is not a requirement to respond to the RFP.**
12. I am aware of your Pre-Proposal Conference on Wednesday, January 9th, 2013. I am wondering if there will be dial-in information available to call in remotely? I am located in California. **Unfortunately, we will not have a conference call line available for this pre-proposal. However, the pre-proposal conference is not mandatory so please feel free to submit any questions and concerns that you may have by e-mail before the questions deadline.**
13. In reference to the state of Delaware's Bid Solicitation DSU13-1-1401, Call Center Services – does the Pre-Proposal Conference scheduled for January 9th at 3:00 EST require mandatory attendance by interested vendors? **No, the pre-proposal conference is not mandatory.**
14. Will you publish any questions or output from the pre-proposal meeting? **Yes, all questions and answers will be posted on the Bid Solicitation Directory Website with the RFP at <http://bids.delaware.gov/>.**
15. On page 8 of the RFP, section VI. Response Specification Requirements, a. "This complete RFP document **including completed cover sheet** and all information requested in the RFP and attachments." Is there a cover sheet that is separate from the RFP? Is it located on <http://bids.delaware.gov/>? **No the cover sheet is not separate from the RFP. This is the first page of the RFP which includes the DSU seal.**
16. Are interested vendors required to register on the state website (<https://de.blackboardconnect.com/>)? **No you do not have to register on the State website.**
17. On page 15 of the RFP, the "Commitment and Non-Collusion Statement" requests the company's Delaware Business License Number. In referencing the "Doing Business with the State" Topic Page, I noted the statement "A business license must be obtained at the time business commences in Delaware." I would like to confirm that interested vendors outside the state of Delaware, if awarded the contract, may apply for and obtain their Delaware Business License post-award. That is correct. **It is not a requirement to respond to the RFP but if awarded the contract, you will be required to obtain a Delaware Business License.**
18. May historic vendor information (including current vendor) be obtained for informational purposes (including pricing)? **CMD Outsourcing Solutions, Inc.**
19. On page 8 of the RFP, Section V. Pricing – for the Chat Session and E-mail pricing matrices, are there estimated/projected volume numbers available to assist the interested vendor with a benchmark upon which to base their pricing? For example, the pricing for the Chat Session and E-mail could vary dependent upon whether there are is 1 chat session per hour,

or 50. Currently, neither Financial Aid nor Student Accounts uses online chat sessions and each office sends out their own emails.

20. Technology--what is in place at current time--Current Call Routing goes through an IVR or what? No, currently Siemens Hicom PBX systems forwards our main number to CMD.
21. Potential Contract Award and start dates for Ramp Up? Looking to award the contract no later than February 28. Contract start date has not been determined.
22. Who is the Current Vendor? What is the Contract Value for the Current Vendor or the future Contract because you plan to expand? CMD Outsourcing Solutions, Inc.
23. How many people currently handle this program inclusive of Supervisors or shift personnel? There are a total of 9 (7 representatives and 2 supervisors).
24. Is there a requirement for the Center to be located in Delaware or it doesn't matter? (It can be located anywhere). No, it is not a requirement for the center to be located in Delaware.
25. Call Tracing--do you mean Call Tracking or is it some version of Skip Tracing that you are asking for. We assume Call Tracking but we await your clarification. Yes call tracking and recording.
26. What are some of the issues with the current provider --if any? No issues with the current provider. However, it is extremely important that the agent can analyze and give accurate account information on a semester basis.
27. Verification(what exactly do they mean by it). Recording or tracking.
28. Does the 85,338 represent all calls? Yes, for the months listed on Attachment B
29. Coverage is it only after hours and weekends or is it truly 24/7 —365 days per year Currently, coverage is during the operating hours of the offices.
30. Are we required to have a Delaware Business License—prior to the bid or can we obtain one after we win the bid? If awarded the contract, you will be required to obtain a Delaware Business License, but it is not a requirement to respond to the RFP.
31. Start time for the bid is end of February or is it Feb 15th? Looking to award the contract no later than February 28. Contract start date has not been determined.
32. Can we have our remote facility cover the service or do you want us to co-locate on your campus and look at employing students part time (could be a conflict?) Current vendor covers our service at their Baltimore office.
33. It appears that we would have access to personal information and financial information?
 - A. Would this include data such as SS numbers? Yes
 - B. If so, is there any additional pre-employment screening that needs to be done over and above the Pomeroy standard? DSU would like for the representatives to have back ground checks completed and bonded for financial aid related inquiries.

34. Is there any kind of data security standard that we need to be in compliance with? **No.**
35. Is there any requirement for a dedicated vs shared resources? **DSU would like to have dedicated agents but understand if this could not be for the entire staff.**
36. What days of the week will the university be 'open'; Monday through Friday? Monday through Saturday? Is 7x24 coverage required? **The university is open Monday to Friday and currently coverage is during our operating hours.**
37. The RFP states that the hours of operation for all days will be 'at least' 9am-4pm. Are there other hours that will require the service desk be open? **The offices are open 9 am to 4 pm on Monday, Tuesday, Thursday and Friday and 9 am to 6 pm on Wednesday. We have special events that may require our offices to be open from 7 am to 5 pm such as New Student Orientation, Hornet Days, etc. We also work extended hours at the beginning of each semester which is 8:30 to 5:30 Monday, Tuesday, Thursday & Friday and 8:30 to 6:00 pm on Wednesday.**
38. The RFP mentions that the hours 'could be changed during peak seasons' – to what hours, when are the peak seasons? and if there is a peak season, will that impact our volumes? Appendix B indicated that the large numbers of calls in the summer of 2012 were caused by delays in Federal Grant money and new software. Are the numbers of calls to be that large every summer? Removing the impacts of federal funding delays and new software, what would have been the expected volume of calls? **The offices are open 9 am to 4 pm on Monday, Tuesday, Thursday and Friday and 9 am to 6 pm on Wednesday. We have special events that may require our offices to be open from 7 am to 5 pm such as New Student Orientation, Hornet Days, etc. We also work extended hours at the beginning of each semester which is 8:30 to 5:30 Monday, Tuesday, Thursday & Friday and 8:30 to 6:00 pm on Wednesday.**
39. As there is a location in Vietnam, will there be any languages supported other than English? **No, the calls we receive are in English.**
40. What happens if we cannot resolve a contact, etc? **Currently the Office of Student Accounts receives a daily spreadsheet of the calls at the end of business day and if it is something that needs immediate attention a "Hot Referral" email is sent.**
41. **Page 5 – Section III** – what date would DSU transfer responsibilities from the current outsource agent to Pomeroy (go live date)? **Go live date has not been determined.**
42. **IV.a** – "In addition, vendor may be asked to provide email and/or chat support", but the Pricing grid on page 8 includes email and chat support. Is email and/or chat support in or out of scope of this engagement? **All information requested on page 8 should be provided which includes email and chat.**
43. **IV.c** – Will DSU provide up-to-date training materials and subject matter experts to address all requirements specified in this section? See also Page 7, item 2, 3, and 6. **Yes**
44. **IV.f** – What performance reports does DSU require? Please explain "Call recordings shall be

accessible by the university at any time during normal business hours for at least 45 days.” Instantaneously available? **Yes** What is the anticipated volume of retrievals? **We have only had to request two within the last year.** Who will manage access to recordings? **Currently, the vendor has access to this information and forwards upon request.** Please clarify 45 days – continuous cycle of recording, retain for 45 days, and then deleted or will periods of 45 days be identified throughout the year to record? **Continuous cycle of recording and retained for 45 days then can be deleted or archived.** Recording only audio data?

45. **IV.2** – Does this objective indicate 90% of inquiries will be answered via a phone call or chat session? **DSU goal is to have 100% customer satisfaction.**
62. **Attachment C.8** – Is the requirement to record every call or only customer calls (inbound calls from parents and students – see IV.f)? **Every call is expected to be recorded.**
63. **Attachment C.13** – Please clarify “13. Can the user specify how and when the messages are to be delivered?” **DSU will specify how messages are to be delivered.**
64. **Attachment C.26, 27, 29** – Does DSU require disaster recovery services? **DSU has a backup system for our databases and generators on campus. IT would be able to provide more information**
65. What is the typical number of outbound calls per month? **This information is tracked by our current vendor.**
66. Can we have a copy of all notes distributed and list of attendees from January 9 bidder conference. **Yes the attendance sheet along with all Q&A's will be posted as an addendum to the RFP at <http://bids.delaware.gov/>.**
67. What level of support is required when questions do not follow any scripts? Do we transfer such calls to the appropriate department within the university? **Each office will have a point of contact and you will be able to follow their current referral process.**
68. What is the anticipated ‘go live’ date for the new vendor? **Go live date has not been determined.**
69. Award notification is listed as February. Is there a concrete or tentative date the University wants final implementation completed? **Tentative award date is February 28. Go live date has not been determined.**
70. Can you provide a volume / demand curve by day of the week and hour of the day? **At this current time that information cannot be provided.**
71. The “Number of Calls Received for Financial Aid and Student Accounts” was helpful, however, please provide a month to month forecast of volume that would be expected month to month, May through August, without the 2012 software implementation effort. **The current average is 2000, but that average will be increased starting in May and June to 4000. Calls are at top peak in July and August.**

72. What are the days of the week and the hours (9:00 a.m. – 4:00 p.m.) that the desk would need to be open? Would you be interested in pricing for on-going 24 x 7 service, or do you only want pricing for “current hours, with potential increase in hours during peak season”?
From 8:30 a.m. to 4:30 p.m.
73. How does the call center contact internal DSU personnel to refer the service request to them – is it from within the Banner System, via phone, email or other avenue? Special coding in Banner tracks interaction.
74. Based on our understanding of the Banner System, it will not replace the Call Center’s use of a robust Problem Management Tool (PMT). Based on the need to update Banner for each call, does Banner allow data imports, or a way to connect the two systems so that we don’t need to provide updates in 2 separate systems (Banner and a PMT)?
75. Does DSU plan to provide the Problem Management Tool, or would the University prefer the vendor to use their own Problem Management Tool (PMT)? If DSU’s, can you provide the name of that package? The Vendor will have to provide its own PMT not the university’s.
76. How do DSU personnel to whom a call may be routed to, manage the request for support from the call center (receive the request, acknowledge the request, and notify the contact center that the request for service has been resolved)? Through DSU’s mainframe.
77. What % of the information and processes that the customer service agents will need is documented in a Knowledge Base or in a centralized repository? Also, if there is some documentation available, how accurate is it? FAQs exist but service should have prior education, and customer service background.
78. In your experience, how many days of training are required before a call center agent is able to provide support? 4 Weeks
79. Pricing – please describe the scope related to the following references in the pricing grid:
- | | | |
|---|---|-------------------------------------|
| <ul style="list-style-type: none"> a. Interactive Web Video FAQ b. Outbound calls c. Voice blast calls | } | We will not be using the following. |
|---|---|-------------------------------------|
80. The following all pertain to Attachment C – the Questionnaire on pages 17 and 18 of the RFP:
- A. . Question 5 – Are you asking us if we will keep the ticket open (for those service tickets that are referred to outside support groups) and to follow up with the caller to see if the incident has been resolved? If so, would you be open to other ways to manage the call “ownership”? First part yes, second part yes.
 - B. Question 13 – Can you explain what “messages” you are referring to? Messages services are unable to address.
 - C. Question 14 – Can you define what you mean by “tracing” service? We will not be using.
 - D. Question 21, 22, and 30 – Can you clarify what messages you are referencing and the “master account list”? Message that University Staff must address.

- E. Question 25 – Typically our “base pricing” is for English support. If you would like pricing for support of other languages, please define the required scope (languages, volume, etc.). **There are no other languages.**
81. What is the Average Handle Time (AHT) for an email response? **Emailing is not necessary.**
82. Does DSU WebChat with students today? If so, what is the average volume each month? **NO**
83. What is the Average Handle Time (AHT) for a WebChat session? **NO**
84. As a lender, our Code of Conduct prevents us from identifying ourselves as the institution. Is DSU open to an alternative greeting mutually agreed upon by both parties? **Not Applicable**
85. Does volume indicated in Attachment B include email volume received and answered? If not, can DSU provide historical numbers of email volume received by month? **Email is not necessary.**
86. For a traditional Financial Aid call, what is the Average Handle Time (AHT) defined as total talk time plus total call wrap up time?
87. Have you noticed a peak call time throughout the day or week? Is there a particular time of day or day of the week that is busier than others? **This day is impacted by University Events and deadlines.**
88. Do you track the call volume that comes in after hours? If so, can you please provide the volume of calls by month? **NO**
89. Please clarify the intent of this question. For callers that leave messages, does DSU wish to have the caller contacted to verify they received a call back? **NO**
90. How does DSU notify the vendor of students for which calls will not be accepted? **Not Applicable**
91. Does DSU text message students today? **NO**
92. Does DSU currently collect Cell Phone Consent for its students? If so, can DSU provide the specific verbiage for review? **NO**
93. Does DSU Message Blast students today? If so, what is the average volume each month? **NO**
94. How does DSU expect the documentation to occur? On the Banner system or the vendor’s telephony system or some other method? **Banner System**
95. Please clarify the intent of this question. What types of messages would be delivered? **Escalated Issue.**
96. Please clarify how a call tracing service is used for DSU? **It is never used.**

97. Please clarify how a message verification service is used for DSU? **Not used**
98. What percentage of calls received today are bi-lingual phone calls? **NONE**
99. Please provide further clarification. What is the intent of the 'master account list'? **No Master Account List.**
100. Does DSU have an Interactive Voice Response (IVR) system callers hear when calling? If yes, what percentage of calls is answered through the IVR versus passed through to a live associate? **NO**
101. Does DSU conduct any outbound dialing campaigns? If so, what is the average volume each month? What is the Average Handle Time (AHT) for outbound dialing? **NO**
102. How is staffing currently handled during peak times? **That information is not known at this time.**
103. What is the master account list that is referenced? **There is no Master account List.**
104. Who is the current call center contractor? **CMD**
105. What price is currently paid for these services? **That information is not known at this time.**
106. How many staff operate the current call center? **There are currently 7 representatives and 2 supervisors.**
107. Where is the current Call Center located? **Baltimore, MD**
108. Are there any specific concerns or bottlenecks related to the current operation of the call center that the the University is trying to address with this RFP?**NO**
109. Is the vendor responsible for any mailing or printing activities? **NO**
110. How long is the initial training program provided by the University? **No training will be provided on Higher Education, only how DSU deploys.**
111. What pricing format is requested (price per call, fixed monthly fee, etc?) **That information is not known at this time.**
112. Please explain how each vendor's price proposal will be scored and compared? **That information is not known at this time.**
113. How many outbound calls are made on a monthly basis? **None**

114. 1. On page 6, under “objectives of the University” #3, you refer to a 90 percent answer rate within one minute during peak periods. How did the University come to an answer time of one minute during peak? Is the University willing to accept a slightly higher answer time than one minute knowing that it will save the University money, yet still provide an above average industry service level? Typically, a one minute answer rate will imply a calls answered percentage of greater than 90 percent. **That information is not known at this time.**
115. We have a number of questions regarding the multiple references to “messages” in some of the following questions. Can you clarify what you are talking about in each instance. For instance, are these regarding outbound campaigns to students, referrals between the school and vendor, etc.? **No messages, no call tracking.**
116. When does the University anticipate starting services? **That information is not known at this time.**
117. The pricing matrix on page 8 asks for pricing for ‘Voice Blast Calls.’ What is the University’s expectation regarding this service? For example, would this be a pre-recorded mass voice message (e.g. Reminder that Registration opens Monday) that is sent to each student on file? An outbound calling campaign done on behalf of the University, based on lists provided by the University to the vendor? **No Voice Blast.**
118. What, if any, outbound services are required, including callback activity or campaign-based communications? Via what medium? **No outbound service.**
119. Regarding chat services, does the University have an internal chat system that it would like its vendor to utilize or will the vendor be expected to use its own software? **NO**
120. Please clarify what the University’s expectations are regarding ‘tracing services?’ **NONE**
121. Please clarify question 5 on the questionnaire – ‘Does the service confirm with the callers that they received a call back?’
- a. Is the intent that the vendor will follow up with a student whose call was previously escalated to the University to ensure all matters have been resolved? **No**
122. Please clarify question 13 on the questionnaire – ‘Can the user specify how and when the messages are to be delivered?’
- a. What types of messages is the University referring to? Callbacks/email responses to an inquiry or campaign-based communications? **No messages**
123. Please clarify question 21 on the questionnaire - ‘Please state how messages will be delivered (i.e., telephone, text, e-mail, etc.).’
- a. What messages are being referred to here? Are these callbacks/responses to email inquiries? Campaign-based communications? **No messages**
124. Please clarify question 30 on the questionnaire – ‘How often does the service send out your ‘master account list’ to the accounts for information updates?’

- a. All student updates would be made in the University's student information system – what additional updates would the University anticipate requiring the vendor to send a 'master account list?' **There is no Master account list.**
125. For clarity, is the successful Contractor expected to use DSU's System or use their system? **Delaware State University**
126. We appreciate receiving your seasonal call volume; however, we would like to know your peak times by week and also by time of day. For example: are Mondays' a high volume day verses the remainder of the week and 10:00 AM thru 1:00 PM spike times during the day? **That information is not known at this current time.**